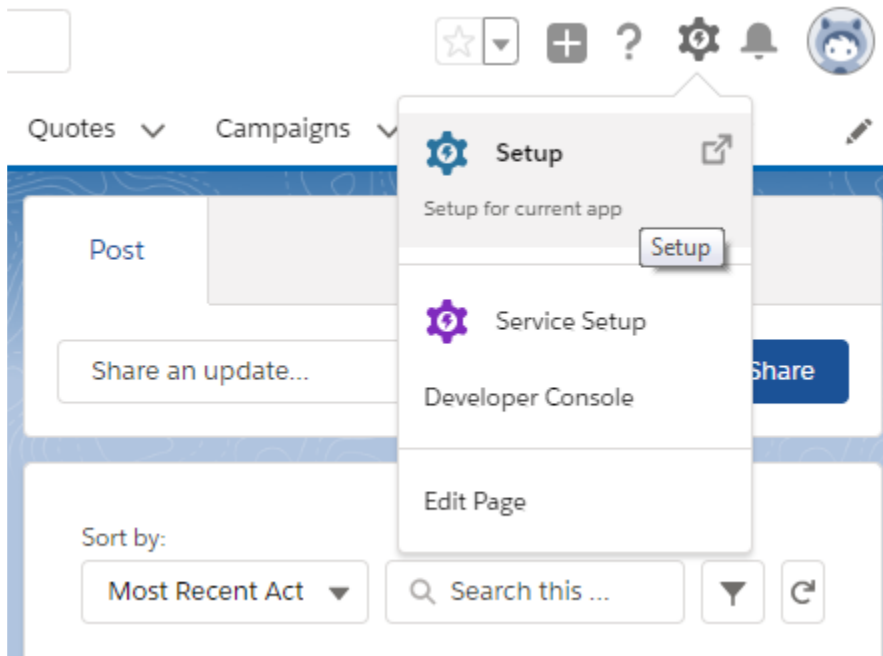
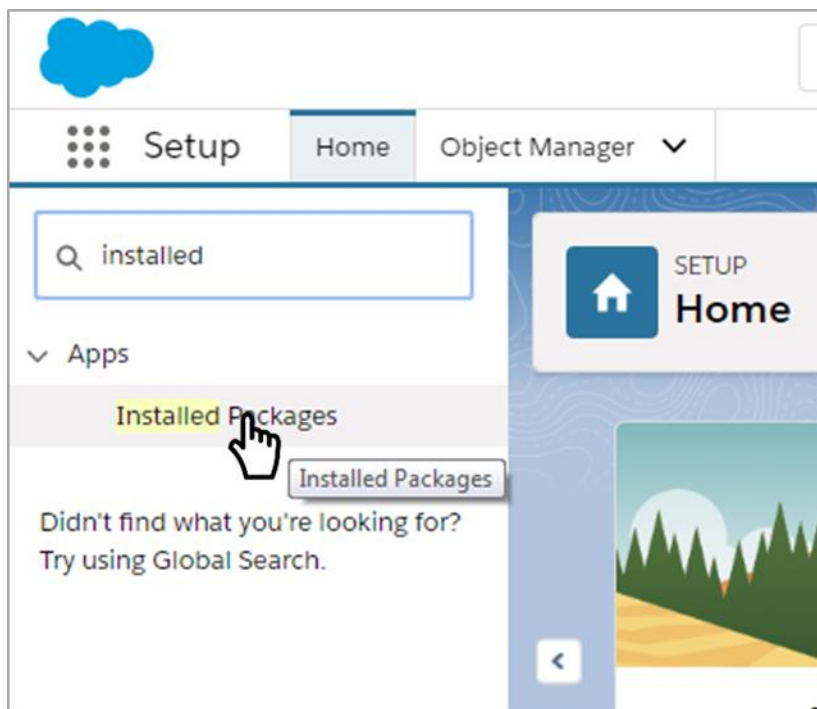


How to assign ProsperVue licenses to users


Step 1: Go to Setup.



Step 2: In the Quick Find box, type “Installed Package”, and click on “Installed Packages” below.



Step 3: Click on Manage Licenses next to Valgen cfMAPP (the package name for ProsperVue).


SETUP
Installed Packages

Installed Packages



On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Packages.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as testable, which allows you to test and customize before deploying. You can deploy the components individually using the other links.


Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall Manage Licenses  	ValgencfMAPP	Valgen.Inc	2.2	ValgencfMAPP
<p>Description cfMAPP: Maps, Mapping and GeoAnalytics Made Smarter!</p>				

Step 4: Click on Add User.


SETUP
Package Manager

Package Details

ProsperVue

[Back to Previous Page](#)

Package Name	ProsperVue	Publisher	Valgen.Inc
Status	Active	Allowed Licenses	12
Expiration Date	5/11/2019	Used Licenses	2

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T

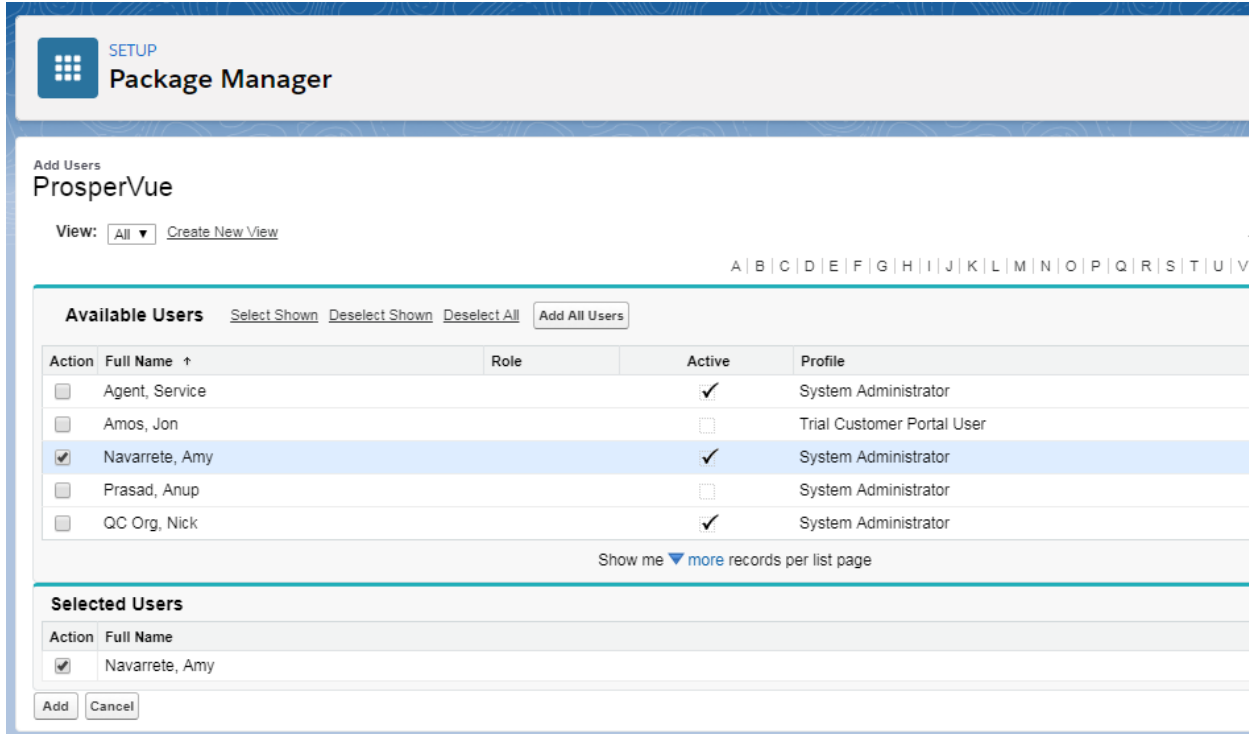
Licensed Users

Add Users
Remove Multiple Users

Action	Full Name ↑	Role	Active	Profile
Remove	Kunchala, Srikanth	SVP Customer Experience	✓	System Administrator
Remove	Srinivasa QC, Parth		✓	System Administrator

Step 5: Click on the user, or if long list then letter for the last name of the user. Then check the box to the left of each user you want to add, and click Add at the bottom, under Selected Users.

If you don't see all users, click on the "more" hyperlink.



SETUP Package Manager

Add Users
ProsperVue

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name ↑	Role	Active	Profile
<input type="checkbox"/>	Agent, Service		✓	System Administrator
<input type="checkbox"/>	Amos, Jon		<input type="checkbox"/>	Trial Customer Portal User
<input checked="" type="checkbox"/>	Navarrete, Amy		✓	System Administrator
<input type="checkbox"/>	Prasad, Anup		<input type="checkbox"/>	System Administrator
<input type="checkbox"/>	QC Org, Nick		✓	System Administrator

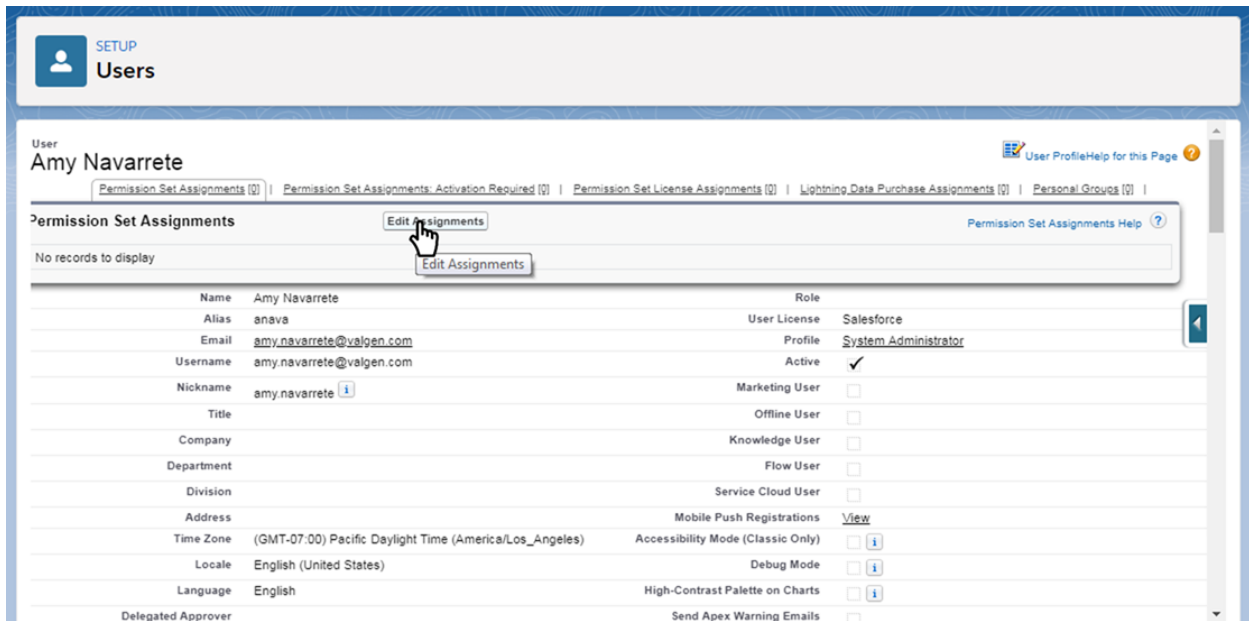
Show me more records per list page

Selected Users

Action	Full Name
<input checked="" type="checkbox"/>	Navarrete, Amy

[Add](#) [Cancel](#)

Step 6: Now Go to Active users, and click on the Full Name of user(s) you just added. Mouse over on Permission Set Assignments, and click on Edit Assignments.



SETUP Users

User
Amy Navarrete

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set License Assignments](#) | [Lightning Data Purchase Assignments](#) | [Personal Groups](#)

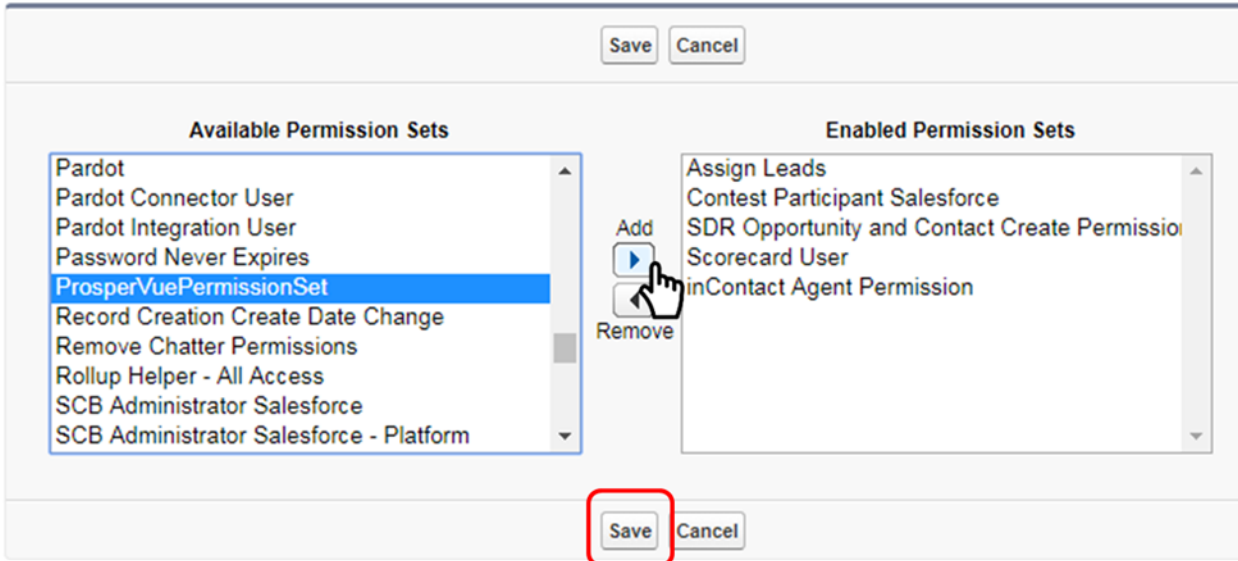
Permission Set Assignments [Edit Assignments](#) [Permission Set Assignments Help](#)

No records to display

Name	Amy Navarrete	Role	
Alias	anava	User License	Salesforce
Email	amy.navarrete@valgen.com	Profile	System Administrator
Username	amy.navarrete@valgen.com	Active	✓
Nickname	amy.navarrete i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Mobile Push Registrations	View
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Locale	English (United States)	Debug Mode	<input type="checkbox"/> i
Language	English	High-Contrast Palette on Charts	<input type="checkbox"/> i
Delegated Approver		Send Apex Warning Emails	<input type="checkbox"/>

Step 7: From the Available column, select “ProsperVue Permission Set”, add to Enabled column and click on Save.

Permission Set Assignments Amy Navarrete



Available Permission Sets

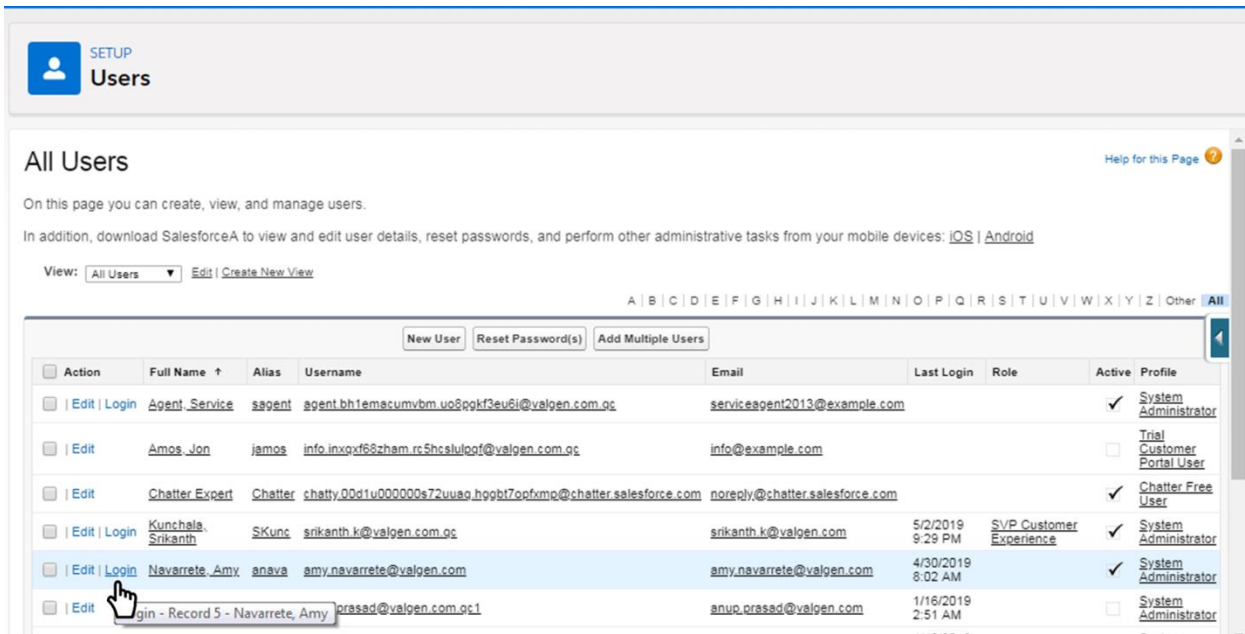
- Pardot
- Pardot Connector User
- Pardot Integration User
- Password Never Expires
- ProsperVuePermissionSet**
- Record Creation Create Date Change
- Remove Chatter Permissions
- Rollup Helper - All Access
- SCB Administrator Salesforce
- SCB Administrator Salesforce - Platform

Enabled Permission Sets

- Assign Leads
- Contest Participant Salesforce
- SDR Opportunity and Contact Create Permission
- Scorecard User
- InContact Agent Permission

Buttons: Save, Cancel (bottom)

Step 8: Go to Active Users, and login as that user to confirm their access to ProsperVue



SETUP Users

All Users

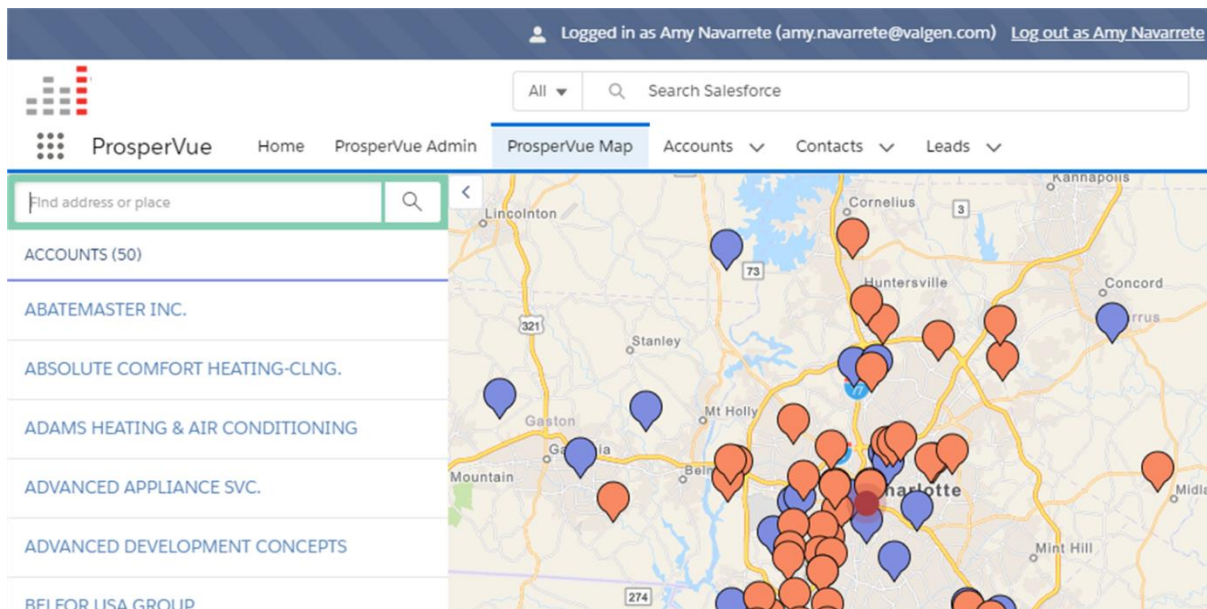
On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users | Edit | Create New View

Action	Full Name ↑	Alias	Username	Email	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit Login	Agent_Service	sagent	agent_bh1emacumvbm_uo89gkf3eu6j@valgen.com.gc	serviceagent2013@example.com			<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Amos_Jon	jamos	info_inxqxf68zham_rc5hcsulqot@valgen.com.gc	info@example.com			<input type="checkbox"/>	Trial Customer Portal User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty_00d1u00000s72uuag_hqgbt7qpfmp@chatter.salesforce.com	noreply@chatter.salesforce.com			<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Kunchala_Srikanth	SKunc	srikanth.k@valgen.com.gc	srikanth.k@valgen.com	5/2/2019 9:29 PM	SVP Customer Experience	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Navarrete, Amy	anava	amy.navarrete@valgen.com	amy.navarrete@valgen.com	4/30/2019 8:02 AM		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	gin - Record 5 - Navarrete, Amy		prasad@valgen.com.gc.1	anu@prasad@valgen.com	1/16/2019 2:51 AM		<input type="checkbox"/>	System Administrator

Step 9: Confirm that the ProsperVue app is available to that user.



The screenshot shows the Salesforce ProsperVue interface. At the top, it indicates the user is logged in as Amy Navarrete. Below the navigation bar, there is a search bar and a list of accounts. The main area features a map of the Charlotte, NC area with numerous location pins. A search bar on the left of the map is highlighted with a green border.

Logged in as Amy Navarrete (amy.navarrete@valgen.com) Log out as Amy Navarrete

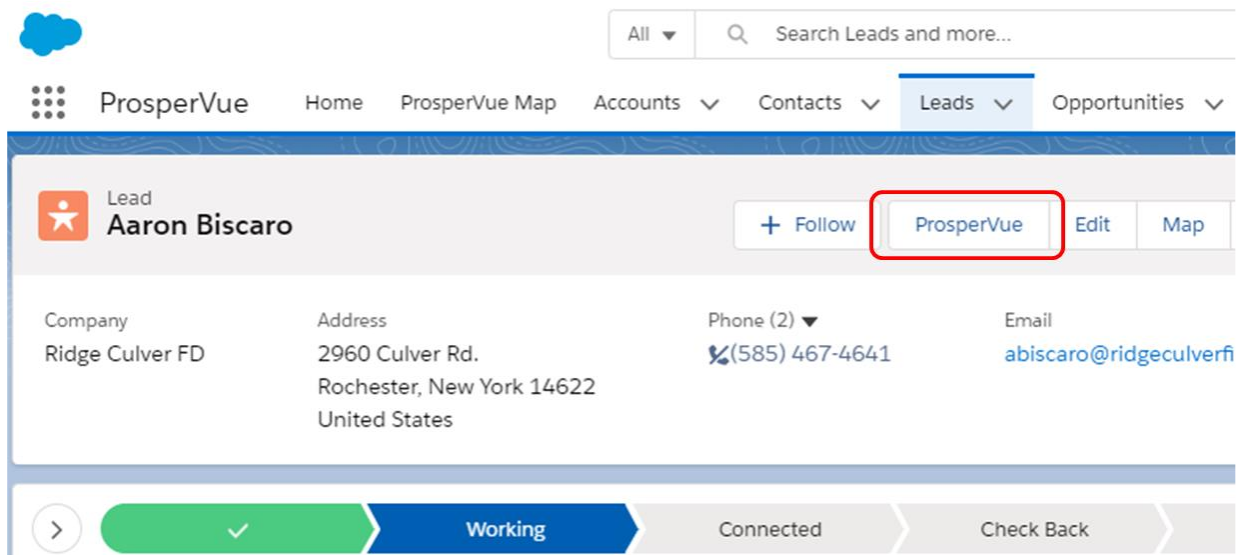
ProsperVue Home ProsperVue Admin ProsperVue Map Accounts Contacts Leads

Find address or place

ACCOUNTS (50)

- ABATEMASTER INC.
- ABSOLUTE COMFORT HEATING-CLNG.
- ADAMS HEATING & AIR CONDITIONING
- ADVANCED APPLIANCE SVC.
- ADVANCED DEVELOPMENT CONCEPTS
- BELFOR USA GROUP

Step 10: Go to page layout for the object, confirm ProsperVue button is visible (click to see the map).



The screenshot shows a Salesforce Lead record for Aaron Biscaro. The record details include the company name, address, phone number, and email. A red box highlights the 'ProsperVue' button in the top right corner of the record header. Below the record details, a progress bar shows the status 'Working'.

ProsperVue Home ProsperVue Map Accounts Contacts Leads Opportunities

Lead
Aaron Biscaro

+ Follow ProsperVue Edit Map

Company: Ridge Culver FD
Address: 2960 Culver Rd., Rochester, New York 14622, United States
Phone (2): (585) 467-4641
Email: abiscaro@ridgeculverfd.com

Working

That's it! You've empowered more users with ProsperVue!